



Department of the Treasury
Internal Revenue Service

The Business Case for *e-file*, a Panel Discussion with Tax Professionals

The Business Case for *e-file*

Administrative Details

- Session will be recorded and available at IRS.gov
- Certificates for CPE will be available
- Questions can be emailed through link under “Questions About the Presentation”
- For technical difficulties, call (800) 717-2821

The Business Case for *e-file* – *New York*

Introduction of Panelists

- Ruth Beltran, Tax Pro
- Sanford Zinman, CPA
- Chun Yee W. Miot, EA

The Business Case for *e-file* – New York

Facts about *e-file*

- Program launched in 1986
- Congressional goal of 80% returns filed electronically
- 94 million returns filed electronically in 2009
- 60 million - 65% - filed by tax professionals

The Business Case for *e-file* – New York

About our panelists

- **Ruth Beltran**

- Owner of Beltran Accounting Services, LLC in New York City.
- Client-focused tax preparation and bookkeeping.
- Enrolled agent since 2003, member of NATP.

- **Sanford Zinman**

- Sole practitioner since 1981.
- Accounting and tax needs for businesses and individuals.
- Pres. Westchester/Rockland National Conference of CPA Practitioners.

- **Chunyee Miot**

- Self-established business in New York, NY.
- Participates in educational seminars and workshops.
- Degree in accounting from Baruch College.

The Business Case for *e-file* – New York

Questions for panelists

- What compelled you to go with *e-file*?
- How did you make the switch to *e-file*?
- What has using *e-file* done for your business?
- How did you handled objections, within your company or from your clients, when you switched to *e-file*?
- What objections have you heard from other professionals, and how would you respond to those objections?

Questions from Participants

Click on link under “Questions About the Presentation”

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Reminders

- Session will be available at IRS.gov
- Certificates for CPE will be emailed for live event
- Survey will be sent for your feedback
- For additional resources, visit www.irs.gov/taxpros
- Thanks to panelists and to all participants

The Business Case for *e-file*

Summary about *e-file*

- Easy to use
- Majority of tax professionals use it
- Saves time
- Saves money
- Safe and secure
- More and more clients request it



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